



COMDTINST 5357.1  
JAN 29, 2003

# COMMANDANT INSTRUCTION 5357.1

Subj: COAST GUARD INDIVIDUAL DEVELOPMENT PLAN (IDP)

1. PURPOSE. This Instruction provides guidance on how to effectively employ an Individual Development Plan (IDP). An IDP is a performance improvement tool designed for the entire Coast Guard workforce; military members, civilian employees and auxilarists. IDPs, properly used, assist people in reaching their career goals. This Instruction outlines the definition and goals of an IDP, the responsibilities of the command, supervisor, and employee. Additionally, the Instruction provides a step by step process for completing an IDP and suggests learning activities to reach developmental goals. Finally, the Instruction provides guidance on how a unit can establish a Professional Development Board (PDB) to assist junior enlisted with their career.
2. ACTION. Area and district commanders, commanders of maintenance and logistics commands, commanding officers of Headquarters units, assistant commandants for directorates, chief counsel, and special staff offices at Headquarters shall ensure the contents of this Instruction are given widest distribution and that use of IDPs are strongly encouraged. Internet release authorized.
3. DIRECTIVES AFFECTED. None.
4. INTENDED AUDIENCE. This Instruction applies to all Coast Guard members and employees.
5. BACKGROUND. The use of IDPs is widely recognized in government and industry as a tool for member/employee professional development and for budgeting available unit training dollars. In addition, the Senior Enlisted Needs Assessment (SENA), Junior Officer Needs Assessment (JONA), and Civilian Needs Assessment (CIVNA) all identified the need for the use of IDPs by the workforce. Using an IDP benefits both the member/employee and

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employer. The member/employee learns about his or her personal and career needs and aspirations by identifying his or her short-term and long-term goals. By doing so, the member/employee identifies what he or she wants to achieve and what steps he or she needs to take to reach those goals. An IDP facilitates a partnership between the member/employee and supervisor by encouraging two way feedback between the member/employee and supervisor, prompting clarification and discussion about the member's/employee's developmental needs, setting goals and plans for the member/employee, and understanding how these goals and objectives tie into the agency's organizational objectives.

## 6. PROCEDURES.

- a. The Coast Guard IDP guide is provided as Enclosure (1). The guide provides an overview of IDP outputs, e.g., acting as a vehicle developed in partnership between the employee and supervisor, to address the needs of the employee and the organization. An opportune time to develop the IDP is at the start of the rating/evaluation cycle. The IDP Guide explains that the IDP is not designed to: 1) appraise performance, 2) act as a contract for training, or 3) clarify or revise a position description. In addition, the IDP guide walks the supervisor and employee through filling out the IDP form (Enclosure (2)).
- b. The PDB definition and checklist, which units are encouraged to use to support junior enlisted in their pursuit of career development, is provided as Enclosure (3). The PDB is made up of the unit's senior enlisted with support from the Command Cadre. They provide guidance and mentoring to the junior enlisted at the unit. The primary purpose of the board is to assist new members in adjusting to the Coast Guard way of life. It provides career development advice to new members and assists them in establishing short and long-term goals and, more importantly, staying focused and on track.

## 7. RESPONSIBILITIES.

- a. Units, supervisors, and members/employees are highly encouraged to use the IDP. Using this Instruction, rather than a locally developed form, will create uniformity across the organization and avoid the member/employee having to start a new IDP when they transfer to a new unit.
- b. Career Development Advisors (CDA) are trained in correct IDP implementation. CDAs will provide unit training as time and funding permit.
- c. Commandant (G-WTL), as program manager for civilian and military professional development, will maintain the IDP guide and form, promote and track its usage, and make it accessible to members/employees through Commandant Instruction, JetForm Filler, CDAs and the Career Central web site at <http://www.uscg.mil/leadership.htm>

8. FORMS AVAILABILITY. Coast Guard form, CG-6021 (10-02), is available in JetForm Filler on SWIII and from the Office of Leadership and Diversity's homepage at <http://www.uscg.mil/leadership.htm>.

/s/

D.E. CLAPP

Acting Director of Reserve and Training

- Encl: (1) Coast Guard Individual Development Plan Guide  
(2) Coast Guard Individual Development Plan Form  
(3) Professional Development Board Definition and Checklist

# **The Coast Guard**



## **Individual Development Plan (IDP) Guide**

## Coast Guard Individual Development Plan - IDP

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### Introduction

This voluntary developmental tool is intended for use by all members of the Coast Guard workforce. The need for an Individual Development Plan (IDP) guide and form was identified by the Senior Enlisted Needs Assessment (SENA), Junior Officer Needs Assessment (JONA), and Civilian Needs Assessment (CIVNA). This document is for all members and employees; however, some sections or references may pertain more to either the civilian or military workforce.

The IDP is a valuable performance enhancement and career development tool for any member (active duty or reserve)/employee. The following information is designed to acquaint you with the purpose, goals, steps, and value of an IDP.

**It is recommended that the supervisor and the member/employee work together on the IDP. Although the IDP is not a performance evaluation tool, a convenient time for the member/employee and the supervisor to meet would be at the beginning of the rating cycle or within 45 days upon entry in a new position/job or Permanent Change of Station.**

It is recommended that you read the entire guide before you start working on your IDP.

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### Definition of an IDP

An IDP is a tool to help individuals reach career goals within the context of organizational objectives. It is a developmental "action" plan to move members/employees from where they are to where they want to go. It provides the systematic steps to build on strengths and overcome weaknesses as individuals

## **Coast Guard Individual Development Plan - IDP**

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improve job performance and pursue career goals. It is a tool for all members/employees regardless of rank or performance.

The most common objectives for having an IDP are to:

- Learn new skills to improve current job performance.
- Maximize current performance in support of organizational requirements.
- Increase interest, challenges, and satisfaction in current position.
- Obtain competencies necessary for a promotion or change in grade, series, or field.

*An IDP is...*

An IDP is:

- A voluntary developmental partnership between the member/employee and supervisor. IDP preparation involves feedback, clarification, and discussion about developmental needs, goals, and plans. Supervisor-member/employee communication is key to the success of the IDP process.
- A vehicle to address the needs of the member/employee and the needs of the organization. The best IDPs begin with a plan to maximize current job performance. The activities can assist the individual in meeting both personal and organizational goals for success.
- A tool to identify a member's/employee's developmental needs based on a comparison of skills required by a job and present abilities. It identifies specific competencies for which the member/employee requires development. The mutual interests and concerns of the individual and the organization must be considered in the IDP process. The member/employee requires supervisor support to reach developmental goals.
- A tool to facilitate a relationship between a mentor and a mentee.

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- A broadly defined developmental plan that includes on-the-job assignments, self-development activities, and formal classroom training.
- An active and ongoing process. An IDP is a living process that encourages member/employee empowerment and growth. Ideally, IDPs should be reviewed, updated, and changed as needed every six months.

*An IDP is not...*

An IDP is not:

- A one-time activity.
- A performance appraisal. The IDP should not be used as a means to formally assess the member's/employee's performance and should not be used for human resources decisions (e.g., advancements, etc.). It does not replace the performance evaluation form/system to determine advancements, promotion, pay, awards, etc. The purpose is professional development, not appraisal. *A member's/employee's decision not to carry out a developmental activity or achieve a goal should not impact his or her performance evaluation. Correct use of an IDP, however, will likely improve a member's/employee's performance and behaviors.*
- A contract for training. Members/employees should include all training interests on an IDP. However, training is not necessarily guaranteed because it is on an IDP. Training decisions are made in accordance with Coast Guard policy and budgetary considerations.
- A way to clarify or revise a position description. If a position description does not accurately describe the duties performed, this is a matter for the employee, supervisor, and the personnel office to resolve. An IDP does not solve this problem.
- A guarantee of advancement or promotion to a higher rank/grade. An IDP can help prepare a

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member/employee to become qualified for a higher rank or graded position, but does not imply a guarantee of advancement or promotion.

- A fix for all supervisor-member/employee relations problems. The IDP is only one part of the comprehensive efforts of an organization to enhance job satisfaction and cooperative work relationships.

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### **Roles and Responsibilities**

The unit, supervisor, and member/employee all have important roles in the IDP process. The Coast Guard's success is directly attributed to the quality of its people. If our people are not encouraged to grow beyond their current knowledge, skills, and abilities, the Coast Guard will not be able to keep pace in a rapidly changing and competitive employment economy. The Coast Guard's ability to develop its people into an interdependent, capable workforce depends on each person contributing to the process.

#### *Member's/employee's Responsibilities*

The member/employee is responsible for:

- Drafting the initial plan.
- Meeting with his or her supervisor, as determined by his or her Performance Evaluation Form, and others (e.g., DOT Connection Counselor, Career Development Advisor (CDA), Command Master Chief (CMC), Command Staff Advisor (CSA), etc.).
- Finalizing the plan and taking full responsibility for follow-through with developmental activities, apprising progress made and changing needs as necessary.
- Sharing with his or her supervisor the responsibility of meeting every six months to review the IDP.
- Arranging a meeting with your unit's Professional Development Board (PDB), if established at your local



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command. See the "Unit's Responsibilities" section on page 5 for additional information on PDBs.

### *Supervisor's Responsibilities*

The supervisor is responsible for:

- Educating members/employees within his/her chain of command on the IDP process and encouraging its use.
- Analyzing the competencies of the member/employee.
- Assessing the unit's/organization's short and long term needs, staffing needs, mission, changes in technology, and the member's/employee's potential to meet those needs.
- Determining what resources are available for member/employee development.
- Meeting with the member/employee to provide feedback about developmental strengths and needs, coaching about possible developmental activities, and proposing a development plan that addresses concerns by specifying, in detail, the goals and technical skills needed for the present job and/or future positions.
- Including projected training needs in the unit's training plan.

### *Unit's responsibilities*

The Command should:

- Encourage its personnel to use IDPs and, within reason, support developmental needs.
- Seek out IDP services that are available. For example, Career Development Advisors (CDA) have been trained in IDP formulation and many are willing to hold IDP workshops for units. The DOT Connection also provides IDP workshops (there may be a fee for the service if a counselor must travel outside of the Washington, D.C. area). Transition Relocation Managers (TRM) can also help facilitate the IDP process.

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- Create a Professional Development Board. The First Unit Professional Development Board, a recommendation of the Senior Enlisted Needs Assessment (SENA), targets “First Term Personnel” (members with 4 years of service or less). The First Unit Professional Development Board is made up of the unit’s senior enlisted with support from the Command Cadre. They provide guidance and mentoring to the junior enlisted at the unit. The primary purpose of the board is to assist new members in adjusting to the Coast Guard way of life. It provides career development advice to new members and assists them in establishing short and long term goals and, more importantly, staying focused and on track. See Enclosure (3) for guidance on the PDB process and a check list sheet.
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### Steps to an IDP

There are five basic steps to creating an IDP:

- Step 1: Conducting a Self-Assessment
- Step 2: Meeting with a Career Counselor or Advisor
- Step 3: Meeting with your Supervisor
- Step 4: Implementation
- Step 5: Follow-up

*Note:* If you are in a mentor/mentee relationship, you should meet with your mentor before beginning your IDP so the two of you can strategize the best approach to take as you go through the “Steps to an IDP.”

#### *Step 1: Conducting a Self-Assessment*

There are different ways to assess your personality, interests, knowledge, skills, and abilities. To make completing an IDP easier, we recommend you conduct a self-assessment and then work with a career counselor to conduct a commercial assessment (see page 8 for information on conducting a commercial self-assessment). The Coast Guard Institute can conduct an Educational Assessment, which determines how your military work experience and/or academic experience can be transferred to a college degree program.

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### *Conducting an assessment of your competencies*

To conduct an assessment of your competencies, start by listing your knowledge, skills, and abilities. You can determine what they are by reviewing current and prior job performance and experience, training/education, and developmental activities to identify the knowledge, skills, and abilities you have. This background review provides concrete information regarding current abilities, strengths, and skills. Review your Training Record; SF-171, OF-612, or Federal Resume; Position Description; performance evaluations; personal data extract (PDE); and any information about significant past training and other developmental activities. Form CG-4082, Record of Professional Development, is a good tool to help you document your training and education.

Conduct research pertaining to any occupations or positions that you desire. Next, determine what skills and abilities need to be developed. Then assess which developmental objectives are required in your current position and which are required for future positions. Try to address your developmental objectives in order of their priority.

Draft your initial IDP following the steps in "The IDP Form" before moving to the next steps. Doing so will enable a career counselor, advisor, or supervisor to better understand your individual needs and goals.

### *Step 2: Meeting with a Career Counselor*

The objective of meeting with a career counselor is to review the information you have collected and developed so far, conduct a commercial self-assessment if you desire, and learn about goal setting, career fields, and career development resources that are available. A counselor can also assist you with documenting your goals and determining which competencies you need to develop to reach them.

The advantage of working with a DOT Connection career counselor, TRM, CDA, Command Staff Advisor (CSA), Command Master Chief (CMC), or Educational Services Officer (ESO) is that they can often help you learn about opportunities that are available to members/employees through the Coast Guard, the Department of Transportation, or external sources. They can also inform you about learning activities that may

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include formal training, a developmental assignment, on the job training, books to read, etc. They can even work with you to link the appropriate developmental activity to the competency and goals. *Keep in mind that you may not find the answer to all your needs or questions from one person since the roles of each of the positions listed vary depending upon their specific role/function in the Coast Guard.* You may need to work with several different types of career counselors or advisors to find the information you need to complete your IDP. See “Who Can Help?” on page 11 for more information on the services of a CSA, CMC, CDA, ESO, TRM or DOT Connection career counselor.

### *Conducting a commercial self-assessment*

A DOT Connection career counselor can work with you to conduct a self-assessment on your personality (Myers Briggs Type Indicator), behavior (Successful Career Planning with DISC), skills (SkillScan), career options (Holland), etc. This information can then be used to develop personal and career goals. A CDA can also assist you with a variety of self assessments including the Strong Inventory (occupational, basic interest, personal style, etc.), Career Assessment Inventory (career decisions involving college, etc.), etc., which are all available through DANTES. In addition, some TRMs can also assist you with the Myers Briggs, etc.

### *Step 3: Member/employee- Supervisor meeting.*

The objective of the supervisor and member/employee meeting is to obtain mutual commitment between the supervisor and member/employee regarding the IDP plan.

Before meeting with the member/employee, a supervisor should:

- Determine if there are competencies that need to be enhanced to improve performance in the member's/employee's present position.
- Be aware of training resources available.
- Be alert to organizational trends and/or planned changes that require the member/employee to develop different skills or enhance current skills.

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The member/employee needs to bring a draft IDP to the meeting. The supervisor needs to bring an understanding of the organization's needs and ideas or plans for developing the member/employee to the meeting. Together they discuss:

- Member's/employee's goals, interests, and career aspirations
- Organization's needs, expectations, and plans
- Developmental objectives for member/employee on which both agree, activities that will achieve the objectives, schedule for activities (considering member's/employee's responsibilities), check-back points, and possible needs for revising or updating IDP.

Together, they identify those competencies that are critical for the member/employee to have in order to reach professional career goals and his/her personal developmental needs. With input from the member's/employee's supervisor, they determine how the member/employee can best achieve his/her goals.

The supervisor and member/employee must work together to adjust and prioritize the objectives of the member's/employee's IDP. If a developmental assignment or requested training course is not feasible, the supervisor has the opportunity to discuss the reasons for denial and recommend alternatives.

The member/employee prepares the final IDP. Both member/employee and supervisor sign the IDP form indicating support of the plan. The member/employee keeps the original IDP and provides a copy to the supervisor.

### *Step 4: Implementation*

The member/employee implements the development plan, submits training requests as appropriate, actively participates in activities, and updates the supervisor on any changes.

### *Step 5: Follow-up*

The member/employee should routinely update and review the plan and meet with the supervisor every six months to determine progress and make changes. For civilian employees, a good time to conduct the IDP review is immediately following the Excellence, Achievement, and Recognition System (EARS)

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semi-annual and annual reviews. Officers may do this following the Officer Evaluation System (OES) and Enlisted personnel, following the Enlisted Performance Evaluation System.

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### **The IDP Form**

The following guidance will assist you in filling out the IDP form (Enclosure (2)).

#### *General Information*

Provide name, position title, grade/rate/rank, and unit. Military members also include date of enlistment and end of enlistment.

#### *State your goals*

Short-Range Career Goals (achievable within 1-2 years) and Long-Range Career Goals (achievable within 2-5+ years). Goals can be written in any format you choose. You can specify a rate, rank, position, series, and grade, if desired (e.g., Program Analyst GS-345-9 or MKC), or simply indicate the new qualification, skill, title, role, or private sector profession you wish to achieve (e.g., Team Leader, Senior Accountant). The more specific the plan, the better you can identify developmental activities that can help you reach your goal.

#### *Competencies needed for your current job*

Identify those competencies that are critical to your current job. Civilians may find these in their EARS performance plan and job position description while military members may find them in their performance qualifications or position requirement. You may determine which areas need improvement with input from your supervisor.

#### *Listing developmental activities*

Identify a developmental activity for each targeted competency. Explore developmental activities in the areas of *education* (e.g., a community college course in effective writing, accounting, etc.), *training* (e.g., on-the-job training such as assisting co-workers with duties or projects or formal classroom training such as a "C" School) and *professional development* (e.g., reading, joining Toastmasters, joining a professional organization, etc.). *Note:* All formal classroom training should have the source (e.g., USDA, Coast Guard Leadership and Management School) identified. For all activities, indicate the intended completion date (e.g., Spring 2003).

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*Listing  
Developmental Goals  
and Objectives*

Identify those competencies that are critical for you to have in order to reach professional career goals and your personal developmental needs. With input from your supervisor, determine which areas will best help you reach your goals.

Following the same guidelines under “Listing developmental activities,” identify a developmental activity for each targeted competency. For all activities, indicate the intended completion date.

*Signatures*

Both you and your supervisor need to sign and date your completed IDP. Fill in the 6 month and 1 year review dates.

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### Resources

*Who can help?*

The Coast Guard has a variety of experts and advisors in place to assist you with career information and/or planning. The knowledge and services of these personnel will vary depending on their job/role and their individual experience. You may have to work with several career counselors or advisors to get the assistance you need.

*CG Career  
Development Advisor*

Career Development Advisors (CDA) are located at Integrated Support Commands, the Headquarters Support Command, and the Institute. CDAs can assist you with career planning, professional development, educational development, and leadership development. They provide unit-wide and individual career development, as well as information pertaining to careers. CDAs are trained in how to develop an IDP.

*DOT Connection*

Located in Washington, D.C., Career Counselors at the DOT Connection are available to all Coast Guard members/employees. Career Counselors are able to assist you via personal meetings, telephone, mail, e-mail, fax, the Internet, etc., to assist you with career planning. A counselor can help you help yourself when making a career change, setting career goals, and developing strategies for enhancing career opportunities and job satisfaction. Additionally, a counselor can assist you with self-assessments and identifying private and public sector job openings. You can contact a career counselor by sending an email to [DOT.careers@tasc.dot.gov](mailto:DOT.careers@tasc.dot.gov) or by calling

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1-800-525-2878. DOT Connection counselors are trained in how to develop an IDP.

### *CG Transition Relocation Manager*

Transition Relocation Managers (TRM) are located at Integrated Support Commands, TRACEN Cape May, the CG Yard, and the Headquarters Support Command. TRMs can assist you in identifying your individual attributes, planning an effective and workable career strategy, and providing you feedback on career issues, options, and barriers. TRMs have a variety of career tools and are certified career coaches.

### *CG Command Staff Advisor*

Command Staff Advisors (CSA) are located in twelve different geographic sites and provide guidance and consultation to civilian employees and their military and civilian supervisors and managers. The CSA is the first stop for information and assistance concerning civilian personnel issues in the Coast Guard.

### *CG Educational Services Officer*

Educational Services Officers (ESO) are located at every Integrated Support Command (ISC) and at other units as a collateral duty. Once you have set your goals and determined your required activities, an ESO can provide you with information on various educational opportunities. For example, an ESO can assist you with college enrollment, counsel you on non-traditional education programs, assist in completing a Tuition Assistance form, assist in locating scholarships or loans, assist in enrolling in college video and audio courses, administer or arrange for the administration of all DANTES sponsored examinations, and is cognizant of high school completion programs and the GED examination.

### *Command Master Chief or Gold Badge*

Command Master Chiefs promote balance between workforce needs and organizational goals. Accessible to all, they encourage communication throughout the organization on issues affecting personnel and mission accomplishment. In addition, they provide guidance to a network of unit level Command Chiefs.

### *Rating Force Manager*

Rating Force Managers are the principle advocate for their specialty and are responsible for the overall health of their enlisted rating. They manage the structure of their workforce



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and ensure that personnel are prepared to meet current and future missions. In addition, they have a crucial role in unit staffing and communicating rating issues within the organization.

### Developmental Activities

#### *Types of learning activities*

Remember, education and training are important but **learning** is paramount. Job, career, and personal development involve more than formal classroom training. Individuals are more likely to retain what they learn when actively applying the skill versus learning about it in a classroom. When preparing your IDP, consider all learning activities and assignments that are available to you. Possible activities and assignments include:

***Special Projects*** - Work of infrequent nature given to a member/employee whose normal range of duties would not include that assignment. For example, to enhance planning skills, the member/employee may be asked to participate in developing a schedule, organizing a meeting/conference, etc.

***Details*** - A temporary assignment to another position, work unit, branch, division, or office. For example, to enhance writing skills and the ability to work as a team member, an assignment to a task force organized to create a handbook describing a new program.

***Shadow Assignments*** - Accompany a technical or managerial member/employee for a brief period to better understand the type of work being performed. For example, “shadowing” a civil rights specialist may increase one’s knowledge of affirmative action plans and programs.

***Job Rotation*** - Temporary reassignment of duties from another position, but within the same occupational area, to the member’s/employee’s position in order to broaden the member/employee. For example, a personnel management specialist that is normally involved in the staffing function could take on classification responsibilities.

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*Collateral Duties* - Assignment of duties outside a member's/employee's normal range of responsibilities that provide a broadening experience. For example, assignment of space planning responsibilities in order to enhance analytical and reporting skills.

*Job Redesign* - Assignment of new responsibilities to a position for the purpose of utilizing a member's/employee's natural abilities or interests. For example, assigning liaison responsibilities to a member/employee who would otherwise not deal with people outside their immediate work unit.

*Committee/Task Force Participation* - Involvement in workforce groups or special emphasis groups. For example, participation in Human Relations Committees.

*Professional Organizations* – Joining and/or volunteering with these organizations offers opportunities for members/employees to develop a variety of organizational and leadership skills. Examples include, American Society of Military Comptrollers, League of Women Voters, Toastmasters.

*“Acting” Assignments* - Temporary assignment of responsibilities to a member/employee. In most cases, these responsibilities would be of a managerial or supervisory nature when that person is out of the office.

*Discussion Groups* - Groups arranged with co-workers (to take place during lunch or after duty hours) for the purpose of researching and discussing technical, managerial, or supervisory skill areas.

### *Other options*

*Where to find CG training information*

You can also read articles and books (one recommended source is the Commandant's Reading List), volunteer, do some research, interview senior/technical people, ask a co-worker to teach you a skill, train someone else, etc.

Look for Coast Guard training information in the annual training schedule, COMDTINST 1540, available on the Training Quota Center's (TQC) web site, <http://www.uscg.mil/hq/tqc/index.htm>.

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*Where to find career  
and professional  
development  
information.*

Coast Guard Career Central web site,  
<http://www.uscg.mil/leadership.htm> (click on Career Central), is  
a central point for Coast Guard career, training, education and  
professional development information for all Coast Guard  
employees: active duty, civilian, reserve, and auxiliary.

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To print or download a copy of this guide and form go to  
[www.uscg.mil/leadership.htm](http://www.uscg.mil/leadership.htm) and click on "Individual  
Development Plan"

Individual Development Plan (IDP)			
Name:		Unit:	
Date of enlistment (military):		Separation date (military):	
Position Title/Grade or Rank/Rate:			
Short Range Career Goals (1-2 years):			
Long Range Career Goals (2-5+ years):			
Competencies Required for Current Job			
Targeted Competency	Developmental Activity, On-the-job Training, or Classroom Training	Outcome Desired	Intended Completion Date & Cost

Individual Development Plan (IDP)			
Developmental Goals			
Goal or Targeted Competency	Developmental Activity, On-the-job Training, or Classroom Training	Outcome Desired	Intended Completion Date & Cost
I certify that I will support the training and development outlined in this plan. However, I understand that this is not a contract for training.			
Signature:		Date:	
Supervisor Signature:		Date:	
6 month review date:		1 year review date:	

## **COAST GUARD PROFESSIONAL DEVELOPMENT BOARD**

The Professional Development Board, a recommendation of the Senior Enlisted Needs Assessment (SENA), targets "First Term Personnel" (members with 4 years of service or less). The Professional Development Board is made up of the unit's senior enlisted with support from the Command Cadre. They provide guidance and mentoring to the junior enlisted at the unit. The primary purpose of the board is to assist new members in adjusting to the Coast Guard way of life.

TRACEN Cape May provides the Coast Guard's newest enlisted military members with a very basic orientation to the Coast Guard. Class "A" schools teach the fundamental tools of the rate and provide basic leadership training. However, the real training and indoctrination for the Coast Guard's newest military members comes from the interactions and relationships they form with their peers and senior members at their first unit.

The new member should meet with the Professional Development Board (PDB) within 60 days of reporting to the unit. Follow-up sessions should occur every 3 to 5 months for non-rated members and every 6 to 9 months for rated members. Added sessions could occur when recommended by the Command or supervisor. Such sessions would be beneficial, for example, when an exit interview needs to be conducted or when it is evident that a member is clearly deviating from his or her intended track.

The overriding theme for the PDB is "TARGET FOR SUCCESS." The Board process is separated into three equal, but very important, parts:

**SETTING THE STAGE:** These are simply the steps for preparing for the session. The who, what, where, and when are determined in this stage. The predetermined location needs to be in an area that allows for private conversation between the board members and the interviewee. Prior to the session, general information should be abstracted from the member's record and recorded on the Check Sheet below.

**THE INTERVIEW:** This section deals with the actual mechanics of the session. An effective session must include a two-way discussion focused on a TARGET FOR SUCCESS. During the session, identify and establish clear expectations. Additionally, establish an action plan that will help the member progress toward achieving his or her goals.

**FOLLOW-UP:** After the session has been completed, it is important to document the session on the Check Sheet. It is recommended that the chairman maintain a file on each member of the completed Check Sheets and Pledge of Personal Commitment. A good follow-up plan will effectively motivate first term personnel to exert the effort necessary to attain their Goals.

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<b>Professional Development Board Check Sheet</b>			
<b>Prior Educational Background:</b>			
	<b>Yes</b>	<b>No</b>	<b>College Major or Subject of Training</b>
<b>GED</b>			
<b>High School Graduate</b>			
<b>Some College</b>			
<b>AA Degree</b>			
<b>BA/BS Degree</b>			
<b>Technical Training</b>			
<b>Certificate of Training</b>			
<b>Certificate of Training</b>			
<b>Other</b>			
<b>Other</b>			

<b>‘A’-School:</b>											
<b>ASVAB Scores</b>	<b>GS</b>	<b>AR</b>	<b>WK</b>	<b>PC</b>	<b>NO</b>	<b>CS</b>	<b>AS</b>	<b>MK</b>	<b>MC</b>	<b>ET</b>	<b>VE</b>
Disqualifying Factors: (U.S. Citizen?, etc.)											
‘A’-School(s) qualified for:											
‘A’-School(s) desired:											
Background investigation needed?				<b>Y</b>	<b>N</b>	Completed?		<b>Y</b>	<b>N</b>		
Flight physical needed?				<b>Y</b>	<b>N</b>	Completed?		<b>Y</b>	<b>N</b>		
Color blindness?				<b>Y</b>	<b>N</b>						
Strike for a rate?				MGIB?				<b>Y</b>	<b>N</b>		
Status of Class ‘A’ School (number on list):											
as of: ____/____/____ Day Mon Yr											



<b>Professional Development Board Check Sheet</b>
<b>Why did you join the Coast Guard and what are your expectations? (Discussion &amp; Notes)</b>

<b>Short-term Goals (discuss and list the following):</b>
◆ Personal (pay off bills, buy car, enroll in school, etc.)
◆ Professional ('A'-School, strike, raise ASVAB scores)
◆ Status of PQS &/or JQR, etc.

<b>Professional Development Board Check Sheet</b>
<b>Long-term Goals (discuss and list the following):</b>
♦ Personal (marriage, family, buy a house, complete a degree, etc.)
♦ Professional (retire with CG, go to OCS, make MCPO or CWO, separate to...)

<b>Discuss and list ideas of how you can achieve your goals while in the Coast Guard (be specific and include completion dates):</b>

<b>If you are planning to separate from the Coast Guard, what are the two main reasons for your decision?</b>
1.
2.